

1 Michael Goering (Special Needs Trust) Case No. 0575302

Attorney Knudson, David N. (for Petitioners/Trustees Michael Poppacoda & Joyce Thomas)

Petition Nineteenth Account and Report of Co-Trustees, and Petition for Its Settlement, For Approval and Allowance of Trustees' Compensation and Attorney's Fees, for Appointment of Successor Co-Trustee; and for Instructions to Make Payments to Related Party on Behalf of Beneficiary

Age: 49 years	MICHAEL PAPPACODA and JOYCE THOMAS , Co-Trustee, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 01/01/15 – 12/31/15	Note: If the petition is granted status hearings will be set as follows:
Cont. from	Accounting - \$235,166.04	• Wednesday, 04/05/2017 at 9:00a.m. in Dept. 303 for the filing of the Twentieth accounting.
<input type="checkbox"/> Aff.Sub.Wit.	Beginning POH - \$195,169.14	
<input checked="" type="checkbox"/> Verified	Ending POH - \$210,580.17	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Bond has been waived.	
<input type="checkbox"/> Not.Cred.	Trustees - \$2,705.80 (1% of the value of the assets for general services totaling \$2,105.80 plus 156 hours @ \$15/hr. (\$25/hr. for each trustee, totaling \$600.00) for specific services such as taking the beneficiary to appointments that require the presence of both trustees.)	
<input checked="" type="checkbox"/> Notice of Hrg	Attorney - \$3,277.50 (per itemization and declaration, 8.65 hrs. at \$300/hr. attorney time and 4.10 hrs. @ \$75/hr. paralegal time)	
<input type="checkbox"/> Aff.Mail x		
<input type="checkbox"/> Aff.Pub.	Costs - \$200.00 (filing fees)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Petitioner's state pursuant to the Order establishing the Trust, if the balance of the Trustee's checking account exceeds \$10,000.00 excess funds are to be transferred into the Trust's blocked account. No transfers were made during the accounting period. The balance in the checking account presently exceeds \$10,000.00; while the fees, attorneys fees and accounting fees will reduce the balance in the checking account, petitioner requests authority to transfer the sum of \$20,000.00 to the trust's blocked account. A separate order authorizing the deposit of \$20,000.00 to the blocked account will be submitted prior to the hearing.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620(c)		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Please see additional page

Co-Trustee, Michael Papacoda, passed away on 02/18/2016, it is necessary that another co-trustee be appointed. Joseph Thomas has knowledge and experience with the administration of the trust, he is the brother of Michael Goering and is familiar with his care and needs. He resides in the same residence, he is now willing to act as co-trustee with his mother, Joyce Thomas. The order establishing the Michael Goering Trust provides, at page 15, lines 5 through 9, "that if any of the original trustees shall fail to act, the surviving trustee shall act as trustee. Any trustee may appoint a successor or co-trustee, subject to court approval and a new bond being obtained."

By the execution hereof, Joyce Thomas appoints and requests that the court approve the appointment of Joseph Thomas as a co-trustee in place of Michael Pappacoda.

Petitioner states as set forth in this accounting and as affirmed in the accountings filed over more than 15 years, the trustees have made payments to Joyce Thomas, mother of the beneficiary, and the person in whose home he resides for his special needs. Payments made monthly include:

PG&E	\$250.00
Care for the beneficiary	\$200.00
Housekeeping services	\$250.00
Cable TV	\$250.00

In addition telephone and internet services are provided to the residence with a portion paid by the trust and the balance paid by Joyce Thomas. During the accounting payments to AT&T were approximately \$109.00 per month. In addition, the Trustees reimbursed Joyce Thomas for various items purchased for the beneficiary.

Petitioners requests the authority to continue making payments to Joyce for the benefit of the beneficiary, subject, always, to review by the court upon the filing of each annual accounting.

Petitioners pray as follows:

1. That the Nineteenth Account and Report of Trustee is approved, allowed and settled;
2. That all acts and transactions of the Trustee and shown in the account be approved;
3. That the Trustees be allowed the sum of \$2,705.80 for their services as Trustees;
4. That the Attorney for the Trustee be allowed the sum of \$3,277.50 for his legal services rendered to said Trustees plus costs of \$200.00 during the account period.
5. That Trustee be instructed an directed to continue making payments to Joyce Thomas for housekeeping services, care services, cable television and to pay an equitable share of the AT&T charges.
6. That Joseph Thomas be appointed Co-Trustee of the Trust to act with Joyce Thomas;
7. That bond be waived for good cause;
8. That the Trustees be authorized and directed to deposit the sum of \$20,000.00 to the trust's blocked account.

Please see additional page

Declaration of Joyce Thomas filed on 04/12/2016 states the hours expended each month as Trustee vary slightly, however, on a general basis the following duties are performed:

Financial Management: Ms. Thomas estimates that the total time expended on financial management is 3.5 hours per month.

Vehicle Maintenance: Ms. Thomas estimates that the total time expended on maintenance for the trust owned vehicle is 6 hours per year.

Shopping Trips: Ms. Thomas estimates that shopping trips with Michael average 8 hours per month.

Accounting and Record Keeping: In addition to the financial matters above, Ms. Thomas states she spends approximately 6 hours per year.

Total time spent is approximately 13 hours per month or 156 hours per year. The requested fees for "ordinary services" of \$2,105.80 equates to \$13.50 per hour which is significantly lower than the \$25.00 requested in the itemized services in the petition.

**Fourth Account Current and Report of Conservator and Petition for
Settlement and Allowance of Conservator's and Attorney's Compensation;
and Petition for Instructions regarding Donation Authorization**

		BARBARA ROMERO , conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 2/1/14 – 12/31/15	1. Petition does not address the bond. Current bond of \$171,000.00 is not sufficient. Bond should be increased by \$340,000.00 for a total bond of \$511,000.00. 2. Order does not comply with Local Rule 7.6.1C. All orders settling accounts shall contacting a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.
		Accounting - \$647,449.25	
		Beginning POH - \$371,066.37	
		Ending POH - \$614,987.53	
Cont. from		Conservator - waives	
<input checked="" type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$1,250.00 (allowed per Local Rule)	
<input checked="" type="checkbox"/>	Verified	Costs - \$870.00 (filing fees)	
	Inventory	Current bond is \$171,000.00	
	PTC	Petitioner states the conservatee has a niece, Natalie Lopez. Natalie is 37 years old and has a diagnosis of pulmonary hypertension. She is being evaluated for a possible lung transplant. Her family started a "Go-Fund-Me Account" to help cover expenses they will have while trying to be by her side. Natalie has 5 children, including 2 toddlers. Natalie has always been active in the conservatee's life. Petitioner believes that if her father, the conservatee, was able to communicate he wouldn't hesitate, as he did prior to his accident, to offer assistance within his means to help his family. Petition is asking the court to allow her to make a donation on conservatee's behalf to Natalie's "Go Fund Me Account" or directly to her mother, Gloria Lopez. As of March 9, 2016 Natalie's "Go Fund Me Account" is \$1,070 of their \$5,000 goal. Petitioner is asking the court to consider allowing her to donate \$4,000 in case they don't reach their goal. The fund will go toward transportation, and any other expenses the family will be faced with to be by her side in San Francisco.	
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Please see additional page			Reviewed by: KT Reviewed on: 5/31/16 Updates: Recommendation: File 2- Castro

Petitioner prays for an Order:

1. The account and report be approved and settled;
2. The acts of Conservator as shown in the account be approved;
3. Payment of Attorney fees in the sum of \$1,250.00 and costs of \$870;
4. Authorization to make a \$4,000.00 donation on behalf of the Conservatee to the Natalie Lopez "Go Fund Me Account"

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, July 6, 2016** at 9:00 a.m. in Department 303, for the filing of additional bond.
- **Wednesday, March 7, 2018** at 9:00 a.m. in Department 303, for the filing of the fifth account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Petition for Approval of Fifth Account Current of Trustee for the Period of April 1, 2014 to March 31, 2016; Approval of Trustee's Fees; Approval of Attorney's Fees.

		WELLS FARGO BANK , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4/1/2014 – 3/31/2016	
		Accounting - \$1,465,078.74	<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, June 6, 2018 at 9:00 a.m. in Department 303, for the filing of the sixth account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Cont. from		Beginning POH - \$ 995,369.18	
	Aff.Sub.Wit.	Ending POH - \$1,020,587.07 (\$18,083.42 is cash)	
✓	Verified	Trustee - \$31,889.11 (already paid, 1.5% of the value of the trust pursuant to its published fee schedule and allowed by court order dated 5/1/2012)	
	Inventory	Trustee x/o - \$2,000.00 (in connection with purchase a new home and modifications to said home. Purchase and modifications were allowed by court order.)	
	PTC	Attorney - \$3,150.00 (7.5 hours @ \$450.00 per hour)	
	Not.Cred.	Costs - \$200.00 (filing fee)	
✓	Notice of Hrg	Trustee is a financial institution. No bond is required.	
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		<p>Reviewed by: KT</p> <p>Reviewed on: 5/31/06</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3- Gamez</p>
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		<p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> That all acts and transactions of the Trustee appearing in the account and report be confirmed and approved; The investments set forth herein be confirmed and approved; The distributions, payments, and all other acts of Petitioner as set forth in the account and report be confirmed and approved; That compensation to the Trustee during the account be approved; Trustee is authorized to pay itself an additional sum of \$2,000.00; That reasonable compensation in the sum of \$3,150.00, plus costs of \$200.00 to the attorney be allowed.
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Probate Status Hearing RE: Filing of the Fourth and Final Account

			NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u></p> <p>Fourth and Final Account filed 5/31/16 is set for hearing 7/7/16.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	
<input type="checkbox"/>	Verified	<input type="checkbox"/>	
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>	
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
<input type="checkbox"/>	Objections	<input type="checkbox"/>	
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
<input type="checkbox"/>	9202	<input type="checkbox"/>	
<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
			Reviewed by: SEF
			Reviewed on: 5/26/2016
			Updates: 5/31/16 (skc)
			Recommendation:
			File 4- Lassley

Status Hearing Re: Failure to File a First Account or Petition for Final Distribution.

DOD: 5/18/07		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>First and Final Account filed 5/23/16 is set for hearing on 6/30/16/</p>
Cont. from 050416		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5/25/16
		Updates:
		Recommendation:
		File 5- Tims

6 Amiah Tracy, Jaedyn Grover, Ryanna Grover & Miley Grover (GUARD/P)
Case No. 11CEPR01093

Petitioner Vargas, Jovanna (Pro Per – Aunt)

Petitioner Moreno, Matthew Adam (Pro Per – Uncle)

Petition for Appointment of Temporary Guardian of the Person

		<u>Temporary Expires 06/01/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		<u>GENERAL HEARING 07/07/2016</u>	
		JOVANNA VARGAS , aunt, and MATTHEW MORENO , uncle, are petitioners.	<u>This petition pertains to Ryanna Grover & Miley Grover only.</u>
Cont. from 051716			
	Aff.Sub.Wit.		<p>Note: Kim Brown and Anthony Brown, maternal aunt and uncle, were appointed Temporary Guardians of the minors, Amiah Tracy and Jaedyn Grover, on 05/12/2016.</p> <p>Minute Order of 05/17/2016: Examiner notes provided in open court. Kelly Grover, mother, represents that the father of Ryanna is Ernesto Fragaso; matter is continued for service as to Mr. Fragaso. Christopher Moreno, father of Miley, objects to the temporary. Any written objections are to be filed and properly served by 05/24/2016. Petition is granted to preserve the status quo.</p> <p>As of this Examiner's review on 05/27/2016, no written objections have been filed.</p> <p>The following issues remain:</p> <ol style="list-style-type: none"> 1. Need proof of personal service five(5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Christopher Moreno (Father of Miley) – Unless the Court dispenses with notice <p><u>Please see additional page</u></p>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 05/27/2016
			Updates:
			Recommendation:
			File 6- Tracy & Grover

6 Amiah Tracy, Jaedyn Grover, Ryanna Grover & Miley Grover (GUARD/P)
Case No. 11CEPR01093

2. The Notice of Hearing filed 05/16/2016 does not indicate that a copy of the petition was served with the notice on the mother at #3 on the proof of service. The Court may require clarification.
3. UCCJEA is incomplete. Need minor's residence information for the past 5 years.

Petition for Probate of Will and for Letters of Administration with Will Annexed;
 Authorization to Administer Under the Independent Administration of Estates Act

DOD: 10/3/11		FRESNO COUNTY PUBLIC ADMINISTRATOR is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond. Full IAEA – ok Will dated 8/11/09 Residence: Fresno Publication: Business Journal Estimated value of estate: Real property: \$311,000.00 Probate Referee: Rick Smith Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative was filed 3/16/16. See Page 2.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 5/4/16:</u> The Public Administrator has no objection to Mr. Milnes' clients being appointed. The Court grants the Public Administrator the right temporarily to have control over the assets under the §7660 petition. If the competing petition is filed, the Public Administrator's petition shall be continued to the new hearing date so that no appearance is necessary on 6/1/16. <u>As of 5/25/16, nothing further has been filed.</u> <u>Minute Order 4/6/16:</u> Mr. Milnes is admonished to address the defects in the will contest. <u>Note:</u> Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative was filed 3/16/16; <u>however</u> , it does not appear that a summons was submitted therewith for issuance pursuant to Probate Code §8250, and because the document indicated this continued hearing date of 4/6/16, the Contest was not assigned it's own separate hearing date at the counter. <u>Due to notice requirements, the Contest cannot be heard until defects are addressed. The Court will set the Contest for noticed hearing pursuant to Probate Code §8250 at this time.</u> <p align="center"><u>SEE ADDITIONAL PAGES</u></p>	
Cont. from 121515, 012716, 030216, 040616, 050416				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input checked="" type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc Reviewed on: 5/25/16 Updates: Recommendation: File 7A - Galvan				

Page 2

Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative filed 3/16/16 BY Hope De Santiago and Stephen Galvan, daughter and son, states:

A document dated 8/11/09 purporting to be the last will was filed in this court on 11/9/11. Petitioners are informed and believe and thereon allege that the decedent left no valid Will. Probate of the purported will should be denied on the following grounds:

1. The decedent was not of sound and disposing mind and therefore lacked testamentary capacity at the time of the alleged execution of the purported will.
2. At the time of signing, the decedent was fluent in the Spanish language and not the English language use in the purported will, and the decedent was not able to read or understand documents written in the English language. As a result, the decedent was not able to understand or comprehend the meaning and effect of the English words used in the purported will and their significance, therefore the decedent lacked testamentary intent and the signature of the decedent to the purported will was executed by the decedent under a mistake as to its legal effect.
3. Petitioners allege the purported will is not and never was the decedent's will as it was made as a direct result of undue influence on the decedent by his son, **ARTHUR G. GALVAN**, and other members of his family, and it is now (sic) and never was the will of the decedent.

See contest for description of the undue influence.

Contestants also object to appointment of the Public Administrator. Petitioners state on 5/10/13, the PA was appointed under Probate Code §7660 in **13CEPR00400** and since that date has served in that capacity. In connection with this new appointment, the PA failed to give proper notice to the intestate heirs

NEEDS/PROBLEMS/COMMENTS:

1. **Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:**

- Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)
- Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)

Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.

Note: Petitioner's #8 indicates that the will provides for distribution to a trust; however, that does not appear to be the case. Need clarification.

2. **Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. Note: Declaration filed 2/26/16 indicates a date of death for a David Garcia Galvan. Is this a typo? There is no David listed at #8.**

Note: If granted, the Court will set status hearings as follows:

- Wednesday Nov. 2, 2016 for filing Inventory and Appraisal
- Wednesday August 2, 2017 for filing the first account or petition for final distribution

Dept. 303, 9:00 a.m. Wednesday, June 1, 2016

Attorney
Attorney

Kruthers, Heather H. (for Public Administrator)

Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Status RE: Filing of a Competing Petition for Probate by Mr. Milnes

DOD: 10/3/11	<p>HISTORY: On 10/3/12, Dorothy M. Galvan, Spouse, filed a Petition for Letters of Administration requesting appointment as Administrator in 12CEPR00883. The petition alleged that the decedent died intestate.</p> <p>Dorothy M. Galvan also filed a Creditor's Claim for \$400,000.00.</p> <p>At hearing on 11/8/12, Dorothy Galvan did not appear; however, Attorney Milnes appeared on behalf of Hope De Santiago, a daughter, and indicated that there was an objection. Mr. Milnes further represented that a Will would be lodged with the Court and the Public Administrator is contemplating on filing a petition. Dorothy Galvan's petition was denied without prejudice. Nothing further was filed in 12CEPR00883 until the PA's petition on 11/19/15 (described below).</p> <p>Court records reflect that a Will dated 8/11/09 was previously lodged with the Court on 11/9/11 by J. Patrick Sullivan, Esq. (The Will is self-proving.)</p> <p>On 5/10/13, the Public Administrator filed an Ex Parte Petition under §7660 in 13CEPR00400, alleging that the value of the estate was not expected to exceed \$150,000.00. The Public Administrator was appointed by Ex Parte Order on 5/14/13 and authorized to administer the estate as intestate.</p> <p>Within the §7660 matter, various creditor's claims were filed and an "Appraisal for Sale" was filed on 1/15/14 alleging an estate value of \$261,000.00. Nothing further has been filed in the §7660 matter.</p> <p>The Public Administrator filed the Petition for Probate of Will at Page A on 11/19/15.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Update: A competing petition for Letters of Administration (not probate of will) was filed 5/27/16 by Dorothy Galvan, Spouse, represented by Attorney Michael A. Milnes, which is set on 7/18/16.</p>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>Reviewed by: skc</p> <p>Reviewed on: 5/25/16</p> <p>Updates: 5/31/16</p> <p>Recommendation:</p> <p>File 7B- Galvan</p>	

Page 2

HISTORY (Cont'd): The Public Administrator's Petition filed 11/19/15 requested that the Will dated 8/11/09 that had been previously deposited with the Court on 11/9/11 be admitted to probate.

On 3/16/16, Hope De Santiago and Stephen Galvan, daughter and son, filed a Contest and Grounds of Objection to Probate of Purported Will and of Appointment of Personal Representative.

The PA's petition has been continued due to various defects and due to the Contest. However, the Contest cannot yet be heard because procedural deficiencies exist. See Page A for details.

Pursuant to Minute Order 5/4/16, it appears Hope De Santiago and Stephen Galvan intend to file a competing petition for appointment as personal representatives.

First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DOD: 4/28/89		FRESNO COUNTY PUBLIC ADMINISTRATOR is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/1/11 – 3/30/16	
		Accounting: \$35,989.19	
		Beginning POH: \$35,989.19	
		Ending POH: \$5,784.20	
	Aff.Sub.Wit.		
✓	Verified	Public Administrator (Statutory): \$1,439.57	
	Inventory		
	PTC	Attorney (Statutory): \$1,439.57	
	Not.Cred.	The Public Administrator proposes to pay the statutory compensation to Thomas Boyajian, attorney for the former. Mr. Boyajian presented an invoice to County Counsel; however, the invoice exceeds the statutory fee; therefore, Petitioner proposes to pay the statutory fee to Mr. Boyajian.	
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Public Administrator (Extraordinary): \$248.00 (for preparation and filing of final tax returns)	
	Conf. Screen	Attorney (Extraordinary): \$1,215.00	
✓	Letters 2/20/15	Attorney for Public Administrator itemizes 8.10 hours @ \$150/hr.	
	Duties/Supp		
	Objections	Costs (Former Attorney): \$225.00 (filing, certification)	
	Video Receipt		
	CI Report	Costs (Public Administrator): \$486.50 (filing, certification)	
✓	9202		
✓	Order	Bond fee: \$89.98	
	Aff. Posting		
	Status Rpt	Closing: \$500.00 for final fiduciary taxes	
	UCCJEA		
	Citation	Per Court Order, preliminary distributions of 30,204.99 were made to Fremon Graves, spouse of the beneficiary Rachel Graves, who has used the funds for his wife's care and daily living expenses.	
✓	FTB Notice	Petitioner requests distribution of the remaining \$140.58 to Rachel Graves, via check made out to her husband, Fremon Graves.	
			Reviewed by: skc
			Reviewed on: 5/31/16
			Updates:
			Recommendation:
			File 8- Logan

Order to Show Cause

		MELINDA C. SIMENTAL , mother, was appointed Guardian of the Estate on 11/19/2014.	NEEDS/PROBLEMS/COMMENTS:
		...	
Cont. from		<p>Minute Order dated 11/19/2014 from the hearing on the petition for appointment set the matter for status hearing on 4/20/2016 for filing of the first account of the guardianship.</p> <p>Minute Order dated 4/20/2016 from the status hearing for filing of the first account of the guardianship estate states: No appearances. The Court issues an Order to Show Cause to Melinda Simental as to why she should not be removed as Guardian of the Estate for her failure to file the first account and her failure to appear today. Melinda Simental is ordered to be personally present in Court or appear via CourtCall on 6/1/2016.</p> <p>Clerk's Certificate of Mailing shows a copy of the Minute Order dated 4/20/2016 was mailed to Melinda Simental on 4/20/2016.</p>	<p>1. Petitioner filed on 5/23/2016 a <i>Final Inventory and Appraisal</i> in addition to the previously filed <i>Final Inventory and Appraisal</i> filed on 4/16/2015. Probate Code § 2620(a) provides that at the expiration of one year from the time of appointment and thereafter not less frequently than biennially, unless otherwise ordered by the court to be more frequent, the guardian of the estate shall present the account of the assets of the estate of the ward to the court for settlement and allowance in the manner provided in Probate Code § 1060. It appears Petitioner may intend the <i>Final Inventory and Appraisal</i> filed 5/23/2016 as a first accounting of the Guardianship Estate. However, this filing does not comply with the requirements of Probate Code § 1060 et seq.</p> <p>2. <i>Final Inventory and Appraisal</i> filed 5/23/2016 contains as an attachment a 6-page copy of two bank account statements, including the bank account number, of the blocked account held in the name of the Ward and the Guardian of the Estate. Court may wish to order that this <i>Inventory and Appraisal</i> with attached bank account statements filed 5/23/2016 be stricken and re-scanned into Court records as a confidential document pursuant to Probate Code § 2620(c)(7).</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: LEG	
		Reviewed on: 5/31/16	
		Updates:	
		Recommendation:	
		File 9- Simental	

10 Abdolah Rahnama (CONS/PE)**Case No. 15CEPR00156****Attorney: Heather H. Kruthers (for Public Guardian – Conservator)****Attorney: Gary G. Bagdasarian (court-appointed for Conservatee)****Probate Status Hearing RE: Filing of the First Account**

		PUBLIC GUARDIAN was appointed conservator of the person and estate on 4/23/2015. <i>Letters issued 5/14/2015.</i> <u>Minute order dated 4/1/2015</u> set this status hearing for the filing of the first account. <i>Final Appraisal of Estate by Public Guardian filed 7/22/2015 shows an estate value of \$194.00.</i>	NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR.</u></p> First account filed 5/26/2016.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: SEF	
		Reviewed on: 5/26/2016	
		Updates:	
		Recommendation:	
		File 10- Rahnama	

Attorney: Heather H. Kruthers (for Public Guardian – Conservator)

Attorney: Ryan Michael Janisse (court-appointed for Conservatee)

Probate Status Hearing RE: Filing of the First Account

		PUBLIC GUARDIAN was appointed conservator of the person and estate on 4/23/2015.	NEEDS/PROBLEMS/COMMENTS:
		Letters issued 5/7/2015.	<p><u>OFF CALENDAR.</u></p> <p>First account filed 5/26/2016.</p>
Cont. from		Minute order dated 4/1/2015 set this status hearing for the filing of the first account.	
Aff.Sub.Wit.			
Verified		Final Appraisal of Estate by Public Guardian filed 7/22/2015 shows an estate value of \$194.01.	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: SEF	
		Reviewed on: 5/26/2016	
		Updates:	
		Recommendation:	
		File 11- Shakeri	

DOD: 11/29/2014	DEBRA GIUFFRIDA , daughter, was appointed Administrator with full IAEA authority on 04/01/2015 without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account or Petition for Final Distribution.
	Letters issued on 04/02/2016	
Cont. from	Final Inventory and Appraisal filed 08/03/2015 shows an Estate valued at \$194,258.78.	Reviewed by: LV Reviewed on: 05/31/2016 Updates: Recommendation: File 12- Couch
Aff.Sub.Wit.	Minute Order of 04/01/2015 set this Status Hearing for the filing of the First and/or Final Account.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	<p>Petitioner unfortunately had to have knee surgery and had to make the decision to relocate to Henderson, NV so she could be taken care of by a close friend because she was unable to care for herself. Due to the move, Mr. Flanigan's office was unable to reach her by mail, phone or email because she did not have an address or phone to where she could be reached. She is now able to be reached and is recovering well, but needs some time to complete documents required to complete the first and final account.</p> <p>Mr. Flanigan respectfully requests that this matter be continued to 08/01/2016 so the petition can complete the last few items needed to file the First and Final Account.</p>	

13 Lei'Lani Shabazz (GUARD/P) Case No. 15CEPR00817**Petitioner Goodwin, Herbert D. (Pro Per – Father)****Petition for Termination of Guardianship**

Age: 3	HERBERT D. GOODWIN , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for: <ul style="list-style-type: none">• Andriette Brezel MCCray (Guardian)• Uchechi Subira Shabazz (Mother)• Paternal Grandparents (Not Listed)• Tammy Cooks (Maternal Grandmother)
	<u>Please see petition for details</u>	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 05/31/2016
		Updates:
		Recommendation:
		File 13- Shabazz

Petitioner Ripson, Ila (Pro Per – Mother – Petitioner)
Guardian Shipman, Amy (Pro Per – Non-Relative – Guardian)
Guardian Shipman, Gary (Pro Per – Non-Relative – Guardian)

Petition for Visitation

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing and proof of service of Notice of Hearing at least 15 days prior to the hearing on the Guardians and the minor.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 5/31/16	
			Updates:	
			Recommendation:	
			File 14- Estrada	

Probate Status Hearing

RE: Receipt for Blocked Account

			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Receipt for Blocked Account filed 5/24/16
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 5/31/16
			Updates:
			Recommendation:
			File 15- Murphy

16 Leann Moreno and Leo Moreno IV (GUARD/P) Case No. 16CEPR00041

Petitioner: Efrain Palma (Pro per – Maternal step-grandfather)

Petition for Appointment of Guardian of the Person (as to LEANN MORENO only)

		<u>TEMPORARY EXPIRES 6/1/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		EFRAIN PALMA , maternal step-grandfather, is petitioner	
		Court Investigator report filed 3/9/2015.	Petition is as to <u>LEANN MORENO</u> only.
Cont. from 031616, 042716			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		See petition for details.	<u>Minute order dated 4/27/2016</u> states Leo Moreno (father) requests a continuance because Belinda Gomez (mother) is in the hospital. The Court notes Ms. Gomez has consented, but grants one continuance so that she may appear. The Court grants temporary orders and continued the matter to 6/1/2016.
			Reviewed by: SEF
			Reviewed on: 5/26/2016
			Updates:
			Recommendation:
			File 16- Moreno

Petitioner Corina Torres (Pro Per, maternal aunt)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		CORINA TORRES , maternal aunt, is Petitioner.	1. Need <i>Notice of Hearing</i> .
		~Please see Petition for details~	2. Need proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for:
Cont. from		Court Investigator's Report was filed on 5/23/2016.	<ul style="list-style-type: none"> • Urbano Magana, father; and/or
<input type="checkbox"/>	Aff.Sub.Wit.		<ul style="list-style-type: none"> • Oscar Lopez Gonzalez, father on birth certificate.
<input checked="" type="checkbox"/>	Verified		3. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for:
<input type="checkbox"/>	Inventory		<ul style="list-style-type: none"> • paternal grandfather; • Sarah Gonzalez, paternal grandmother listed in <i>Child Information Attachment</i>. • Paternal grandmother (mother of Urbano Magana); • Rafael Torres, maternal grandfather; • Maternal grandmother.
<input type="checkbox"/>	PTC		4. Need <i>Duties of Guardian</i> form signed by Petitioner.
<input type="checkbox"/>	Not.Cred.		5. Need proposed order and proposed letters.
<input type="checkbox"/>	Notice of Hrg	X	Reviewed by: LEG
<input type="checkbox"/>	Aff.Mail	X	Reviewed on: 5/31/16
<input type="checkbox"/>	Aff.Pub.		Updates:
<input type="checkbox"/>	Sp.Ntc.		Recommendation:
<input type="checkbox"/>	Pers.Serv.	X	File 17- Lopez
<input checked="" type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	X	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			<p><u>Minute Order 4/26/16</u> <u>(Temp)</u>: The Court finds due diligence and dispenses with notice as to the unknown father. Maria Villa is admonished to never leave the minor alone with the mother.</p> <p>1. According to the Court Investigator's report, the mother identified the father as JONATHAN CASILLAS. Therefore, need personal service on the father and service on the paternal grandparents pursuant to Probate Code §1511.</p>
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 5/31/16
			Updates:
			Recommendation:
			File 18- Villa

19 Josiah Gonzalez (GUARD/P)**Case No. 16CEPR00355**

Petitioner: Nadine Gonzalez (pro per)

Petitioner: Mario Gonzalez, JR (pro per)

Objector: Daisy Banda (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 6/1/2016</u>	NEEDS/PROBLEMS/COMMENTS: 1. Petition lists petitioner Nadine Gonzalez as the paternal grandmother. She is the paternal step-grandmother. Therefore need name and address of the biological paternal grandmother. 2. Need proof of service of the Notice of Hearing along with a copy of the Petition or consent and waiver of notice or declaration of diligence on: a. Paternal grandmother b. Unknown maternal grandfather – unless court dispenses with notice.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 5/31/16
			Updates:
			Recommendation:
			File 19- Gonzalez

DOD: 05/05/2007	ROSE MARY LITTON , surviving spouse, is petitioner and requests appointment as administrator without bond.		NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/11/2016: The Court will allow the Inventory and Appraisal completed by the referee that was not appointed only this one time. Note: If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Monday, 11/02/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Monday, 08/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	All heirs waive bond		
Cont. from 051116	Full IAEA – o.k.		
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate		
<input checked="" type="checkbox"/> Verified	Residence: Fresno		
<input type="checkbox"/> Inventory	Publication: The Business Journal		
<input type="checkbox"/> PTC	Estimated value of the Estate:		
<input type="checkbox"/> Not.Cred.	Real property - \$185,000.00		
<input checked="" type="checkbox"/> Notice of Hrg	Probate Referee: Steven Diebert		
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed on: 05/27/2016
			Updates:
			Recommendation: Submitted
			File 20- Litton

DOD: 01/20/2016	ALMA D. LOUSBERG , ex-spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Page #24 is a related case. It is the Petition for Appointment of Guardian of the Estate filed by Alma D. Lousberg, mother/petitioner. Note: Petitioner originally filed in Pro Per however has now retained Catherine Amador. Minute Order of 05/12/2016: Examiner notes provided in open court. As of this Examiner's review on 05/27/2016, there has been nothing new filed. The deficiencies with the pleadings include, but are not limited to, the following: 1. It does not appear that the petitioner has the standing to petition the Court as she is not the successor in interest. The minor child, Emma Lang's is the successor in interest therefore the duly appointed guardian of her estate can petition on her behalf. 2. This petition can only pass the decedent's property to the successor in interest any other requests regarding the real property should be made in the Guardianship of the Estate case. <p style="text-align: center;">Please see additional page</p>
	40 days since DOD	
	No other proceedings	
Cont. from 051216	I&A – NEED	
Aff.Sub.Wit.	Will dated: 03/20/2015	
<input checked="" type="checkbox"/> Verified	Petitioner requests permission to enter the real property and to sell the real property and place the funds into a trust account. Petitioner states that both homeless and drug addicted individuals are stealing personal property from the home, breaking windows, hanging around at night and causing problems around the empty house. Petitioner states it is essential that she be able to conduct business regarding the home. There are no other heirs to decedent's estate. Decedent named the petitioner as administrator of his estate in his will.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 05/27/2016
Updates:
Recommendation:
File 21- Lang

3. Petition was opened using a Fee Waiver. Filing fees are considered cost of administration and must be paid prior to distribution of property. Filing fee of \$435 will be due prior to distribution of the real property should the Court grant this petition.
4. Need original will to be deposited with the Court pursuant to Probate Code §8200(a)(1).
5. Need Inventory and Appraisal.
6. Attachment 11 does not include the decedent's interest in real property.
7. Need Notice of Hearing.
8. Need proof of service of the Notice of Hearing on Emma Lang.
9. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.

22 Karen McCrystyn (Estate) Case No. 16CEPR00431

Attorney Pascuzzi, Susan L. (for Kelley Youngs – Petitioner – Daughter)

Petition for Letters of Administration with IAEA

DOD: 03/31/2016		KELLEY YOUNGS , daughter is petitioner and requests appointment as Administrator without bond. Sole heir waives bond Full IAEA – o.k. Decedent died intestate Residence: Clovis Publication: The Business Journal <u>Estimated value of the Estate:</u> Personal property - \$500,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> If the petition is granted status hearings will be set as follows: • Wednesday, 11/02/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 08/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: LV
Reviewed on: 05/31/2016
Updates:
Recommendation: Submitted
File 22- McCrystyn

22

Dept. 303, 9:00 a.m. Wednesday, June 1, 2016

23 Georgina Jannette Caballero (CONS/P) Case No. 16CEPR00432

Attorney Kruthers, Heather H (for Public Guardian)

Petition for Appointment of Probate Conservator (Initial)

		<u>TEMP EXPIRES 06/01/2016</u>	NEEDS/PROBLEMS/COMMENTS:	
		PUBLIC GUARDIAN is Petitioner. <u>Please see petition for details</u>	Court Investigator advised rights on 05/19/2016	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 05/31/2016	
			Updates:	
			Recommendation:	
			File 23- Caballero	

23

24 Emma Lang (GUARD/E) Case No. 16CEPR00433**Attorney Amador, Catherine A. (for Alma D. Lousberg - Petitioner – Mother)****Petition for Appointment of Guardian of the Estate (Initial)**

		TEMPORARY DENIED ON 06/01/2016	NEEDS/PROBLEMS/COMMENTS:
		ALMA D. LOUSBERG , mother, is petitioner and requests appointment as Guardian of the Estate without bond.	<p>Note: Page #21 is a related case. It is the Petition to Determine Succession filed by Alma D. Lousberg, mother/petitioner.</p> <p>Note: Petitioner originally filed in Pro Per however has now retained Catherine Amador.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Dennis Lang (Paternal Grandfather) • Josefina Rios (Maternal Grandmother) 3. Absent showing of good cause, it is the policy of the Court to block all funds in a guardianship estate. Petitioner states the estimated value of the estate is zero. Need clarification regarding the estimated value of the estate. 4. #9c. of the Order states that \$80,000.00 to be deposited into a blocked account. Is this in addition to the real property? Need clarification.
Cont. from		<u>Please see petition for details</u>	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	N/A	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 05/31/2016
			Updates:
			Recommendation:
			File 24- Lang

DOD: 05/17/2015	DENNIS SALWASSER , son/named		NEEDS/PROBLEMS/COMMENTS:
	Executor without bond is petitioner.		
	Full IAEA – o.k.		1. Petition indicates decedent's residence at the time of death was Reedley, California, therefore the correct publication should be The Reedley Exponent. Petitioner published in The Fresno Business Journal.
	Will dated: 12/30/1999		
Cont. from	Residence: Reedley		Note: If the petition is granted status hearings will be set as follows:
<input type="checkbox"/> Aff.Sub.Wit.	Publication: The Business Journal		
<input checked="" type="checkbox"/> Verified	Estimated value of the Estate:		<ul style="list-style-type: none"> • Wednesday, 11/02/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 08/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input type="checkbox"/> Inventory	Personal property - \$214,120.00		
<input type="checkbox"/> PTC	Probate Referee: Steven Diebert		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			Reviewed by: LV Reviewed on: 05/31/2016 Updates: Recommendation: File 25- Salwasser
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

26AAttorney
Attorney**Gilberto Artega Medrano (CONS/PE)**Ruiz, Richard A. (for Petitioner Jessica Hernandez – Granddaughter)
Istanboulia, Flora (Court appointed for Proposed Conservatee)**Case No. 16CEPR00435****Petition for Appointment of Probate Conservator of the Person and Estate**

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 5/19/16. Voting rights affected – need minute order. <u>Minute Order 5/3/16 (Temp):</u> Mr. Krbecek states that he intends to file a competing petition. Both Mr. Ruiz and Mr. Krbecek agree that a temporary conservator is not necessary today; Mr. Ruiz withdraws the temporary petition. The general hearing remains set for 6/1/16 and the competing petition shall be set for the same date if timely filed. <u>Note:</u> See Page B re competing petition filed 5/3/16 by Helen Medrano, Spouse. <u>SEE ADDITIONAL PAGES</u>
	Aff.Sub.Wit.		Reviewed by: skc Reviewed on: 5/31/16 Updates: Recommendation: File 26A- Medrano
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

26A

NEEDS/PROBLEMS/COMMENTS:

1. Need clarification re the request for conservatorship of the estate with reference to Local Rule 7.15.4., which states that when the only asset of a proposed Conservatee is public benefits, conservatorship of the estate is not required.
2. The Capacity Declaration does not address the request for dementia medication powers.
3. Notice of Hearing was served on relatives without a copy of the petition as required by Probate Code §1822. Further notice may be required.
4. The competing petition filed by Helen Medrano lists numerous additional relatives that were not listed or given notice by Ms. Hernandez. Further notice may be required.

26BAttorney
Attorney**Gilberto Artega Medrano (CONS/PE)**Krbechek, Randolph (for Helen Medrano – Spouse – Competing Petitioner)
Istanboulian, Flora (Court appointed for Proposed Conservatee)**Case No. 16CEPR00435****Petition for Appointment of Probate Conservator of the Person and Estate**

See petition for details.			NEEDS/PROBLEMS/COMMENTS: 1. Need Citation and proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing per Probate Code §1824 on Proposed Conservatee. Proof of Service indicates service of Citation on 5/22/16; however, the Citation has not been filed, and 5/22/16 is only 9 days prior to the hearing.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	X	
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 5/31/16
			Updates:
			Recommendation:
			File 26B- Medrano

26B

Petitioner: Stanley Wayne Bragg (Pro per – Brother)

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 7/20/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		STANLEY BRAGG, JR., brother, is	1. Need <i>Notice of Hearing</i> .
		petitioner	
			2. Need proof of personal service of <i>Notice of Hearing</i> with copy of petition at least 5 court days before hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for:
Cont. from			a. Catina Owens (mother)
	Aff.Sub.Wit.		
✓	Verified		
		See petition for details.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: SEF
	Status Rpt		Reviewed on: 5/27/2016
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 27- Bragg

28 Maria Marez, Daniel Marez, Briahana Marez & Arturo Nunez (Guard/P)
Case No. 06CEPR01163

Petitioner: Maria C. Lopez (pro per)

Petition for Appointment of Temporary Guardian of the Person

			General Hearing 7/20/16		NEEDS/PROBLEMS/COMMENTS:	
			MARIA C. LOPEZ , maternal grandmother, is petitioner. Please see petition for details.		This petition is as to ARTURO NUNEZ only. Petitioner was previously appointed guardian of Maria, Daniel and Briahana. 1. Need proof of personal service of the Notice of Hearing along with a copy of the temporary petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Arturo Nunez (father) b. Regina Carrillo (mother)	
Cont. from						
<input type="checkbox"/>	Aff.Sub.Wit.					
<input checked="" type="checkbox"/>	Verified					
<input type="checkbox"/>	Inventory					
<input type="checkbox"/>	PTC					
<input type="checkbox"/>	Not.Cred.					
<input checked="" type="checkbox"/>	Notice of Hrg					
<input checked="" type="checkbox"/>	Aff.Mail	W/				
<input type="checkbox"/>	Aff.Pub.					
<input type="checkbox"/>	Sp.Ntc.					
<input type="checkbox"/>	Pers.Serv.	X				
<input checked="" type="checkbox"/>	Conf. Screen					
<input checked="" type="checkbox"/>	Letters					
<input checked="" type="checkbox"/>	Duties/Supp					
<input type="checkbox"/>	Objections					
<input type="checkbox"/>	Video Receipt					
<input type="checkbox"/>	CI Report					
<input type="checkbox"/>	9202					
<input checked="" type="checkbox"/>	Order					
<input type="checkbox"/>	Aff. Posting					
<input type="checkbox"/>	Status Rpt					
<input checked="" type="checkbox"/>	UCCJEA					
<input type="checkbox"/>	Citation					
<input type="checkbox"/>	FTB Notice					
					Reviewed by: KT	
					Reviewed on: 5/31/16	
					Updates:	
					Recommendation:	
					File 28- Marez & Nunez	

Petitioner Janna Linn Morwill (Pro Per, maternal aunt)
 Petitioner Cyd Ranae Morwill (Pro Per, maternal aunt)

Petition for Appointment of Temporary Guardian of the Person

		<p align="center"><u>General Hearing set for 8/1/2016</u></p> <p>JANNA LINN MORWILL and CYD RANAE MORWILL, maternal aunts, are Petitioners.</p> <p align="center">~Please see Petition for details~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i> and proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i> for: <ul style="list-style-type: none"> • Father. 2. Need Attachment 3 explaining answer to Item 3 of Petitioner Janna Moorwill's <i>Confidential Guardian Screening</i> form filed on 5/18/2016. 3. <i>Child Information Attachment</i> states the child is a member of the Mona Indian Tribe. Petitioners must complete the original <i>Notice of Child Custody Proceeding for Indian Child</i> (Form ICWA-030), which the Court will serve on necessary agencies. File contains a blank copy of this form for the Petitioners to complete and return to the Probate Clerk as soon as possible for filing and service. 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 5/31/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 29- Villanueva</p>		